

## **WHAT IS PRELIMINARY REVIEW?**

Preliminary review is a **voluntary, fee-based service** that is tailored to the applicant's information needs and familiarity with the City's codes, policies and development review processes. It is intended to be a time saving process that will benefit you, the prospective applicant. Preliminary review can also help you reduce the time and money spent revising plans to meet City standards before they go to public hearing.

In filing for preliminary review, you are encouraged to provide any information that may be helpful for staff to understand your project concept and the information you need to proceed. Generally, the depth and completeness of staff responses to your specific questions depend on the amount, depth, and accuracy of the information you provide with your request. Complete and detailed information from the prospective applicant often results in better staff analysis, and consequently a more thorough feedback. For preliminary reviews, submittal of a plan drawn to scale is highly desirable. A Project Manager assigned to your project will then call you with comments and recommendations after it has been reviewed within five (5) working days (single-family & basic review) or 15 working days (comprehensive review). When possible, your future project application will be assigned to the same Project Manager who reviewed your preliminary plans.

## **IS PRELIMINARY REVIEW A DEVELOPMENT APPLICATION?**

No. Your submittal for preliminary review does not constitute a formal development application with the City. Only after you have submitted a complete development review application, including environmental clearance and paid the appropriate filing fees, will your project be considered "on file."

## **HOW LONG ARE PRELIMINARY REVIEW RESPONSES GOOD FOR?**

The Department's policy is to honor commitments made to prospective applicants in response to a preliminary review. However, a different response may result from a formal application for the same project if, for instance,

the City Council changes development policies, operational conditions of surrounding streets change, or more complete information regarding environmental studies is available. Since preliminary review responses are based on analyzing a snapshot of design and policy factors that may change over time, it is not realistic to condition their validity on time. Therefore, it is imperative that prospective applicants file formal applications as soon as preliminary review is completed.

## **WHAT CHOICES OF PRELIMINARY REVIEW DO I HAVE?**

Prospective applicants may choose between three preliminary review options: **existing single-family property review** (planning only), **basic review** (planning only), and **comprehensive review** (multi-departmental). An applicant may choose existing single-family or basic review when the information requested relates to planning issues only. When it involves other departments or divisions, the applicant should choose comprehensive review.

The **existing single-family property and basic review options** involve staff analysis and a telephone response from the Project Manager only, with additional fee-based services available, e.g. meetings and site investigations with the Project Manager, and presentation of responses and recommendations in writing to the applicant. The **comprehensive review option**, on the other hand, includes an initial site check, inter-departmental coordination, one inter-departmental meeting with the applicant, and a preliminary review report. Additional meetings, site investigations, and the review of technical reports are available upon payment of the applicable fees.

## **HOW SHOULD I PREPARE?**

Pre-planning can reduce the applicant's potential mistakes early in the development process, and save future processing costs. Prospective applicants should begin their project-planning by first obtaining the zoning and General Plan designations for their project site. Generally, the zoning of the site determines the type of project you can build, the bulk of buildings, and the

level of activity allowed on the site. The General Plan designation establishes the guiding policy upon which all land use decisions must be based. You may call the Department of Planning, Building and Code Enforcement (Planning Divisions) at (408) 277-4576, or visit the department's WebPage at [www.ci.san-jose.ca.us/planning/sjplan](http://www.ci.san-jose.ca.us/planning/sjplan) to obtain this information. Please have the County Assessor's Parcel Number (APN) and location of the property when you call. The counter planner uses the APN to find the exact location of the property on our zoning maps. The APN can be found on either your property tax bill or by calling the County Assessor at (408) 299-3227. They will need the address of your property.

Once you know the correct zoning, you should research the regulations of the zoning district. The Zoning Code Summary handout is a good place to start. A more complete source of information is the Zoning Ordinance. Finally, the Commercial, Residential, or Industrial Design Guidelines should be consulted. The guidelines describe the design objectives that are compatible with City Standards. These documents are available for review or purchase from our Department at 801 North 1st Street, Room 400.

Prospective applicants can also obtain assistance from the counter planner in determining the best preliminary review option for their needs, or the implications of going directly to formal application.

## **WHAT SHOULD I SUBMIT?**

1. **Provide Preliminary Review Exhibits** – exhibits are useful in communicating the applicant's project concept to staff. Listed below are examples of exhibits you are required to submit to facilitate the review of your project.
  - a) Assessor's Parcel Number and Map.
  - b) Preliminary Site Plan drawn to scale (projects involving site development) indicating:
    - Existing & surrounding uses.
    - Building footprint and setbacks.
    - Street frontage.
    - Off-street parking and circulation.

- Proposed uses and site operation.
  - Proposed grading.
  - Driveway location.
  - Size, location and type of existing trees and proposed tree removals.
  - Landscaping.
  - Property Lines.
  - Scale and North Arrow.
- c) Photographs of Site and Surroundings.  
Photographs are very important for preliminary reviews of all projects. They are particularly encouraged for infill projects which involve existing structures to show the context of the surrounding neighborhood. Photos may be numbered to correspond to numbered views on the site plan.
- d) Any other documents that may assist staff to answer the questions you want resolved through the preliminary review process.

## 2. **Complete Preliminary Review Questionnaire** -

applicants are required to complete this questionnaire to the best of their ability and to indicate any inapplicable items. A well-completed application will help Planning staff understand your proposal and which other departments and divisions to involve in its review.

## 3. **Copies** - applicants are required to submit the following sets of preliminary site plans for each project concept that involves physical site development:

- a) Existing Single Family Property Review (planning only)- two sets.
- b) Basic Review (planning only) - two sets.
- c) Comprehensive Review (multi-departmental) – five sets. Project manager will contact applicant if additional copies are needed.

## ***I'M READY, NOW WHAT?***

An appointment is not required to submit a preliminary review. A counter planner will accept a completed preliminary review Monday, Wednesday, Friday from 9:00 a.m. to 5:00 p.m. or Tuesday, Thursday from 10:00 a.m. - 5:00 p.m.

For more information  
call (408) 277-4576



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# Preliminary Review



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